

Initial Consultation for Estate Planning

Dear [Client's Name],

Thank you for reaching out regarding your estate planning needs. We appreciate the opportunity to assist you in creating a comprehensive plan that meets your personal goals and ensures the security of your loved ones.

This letter serves to confirm our initial consultation scheduled for [Date] at [Time]. We will be meeting at [Location/Office] or via [Zoom/Phone Call]. Please bring any relevant documents, such as:

- Current wills and trusts
- Financial statements
- Property deeds
- Insurance policies

During our meeting, we will discuss your objectives, any specific concerns you may have, and the various estate planning options available to you. Our aim is to ensure that you feel confident and informed about the process.

If you have any questions prior to our meeting, please do not hesitate to reach out at [Your Contact Information]. We look forward to assisting you on this important journey.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]